

## ASSESSOR

### Donald E. Williamson

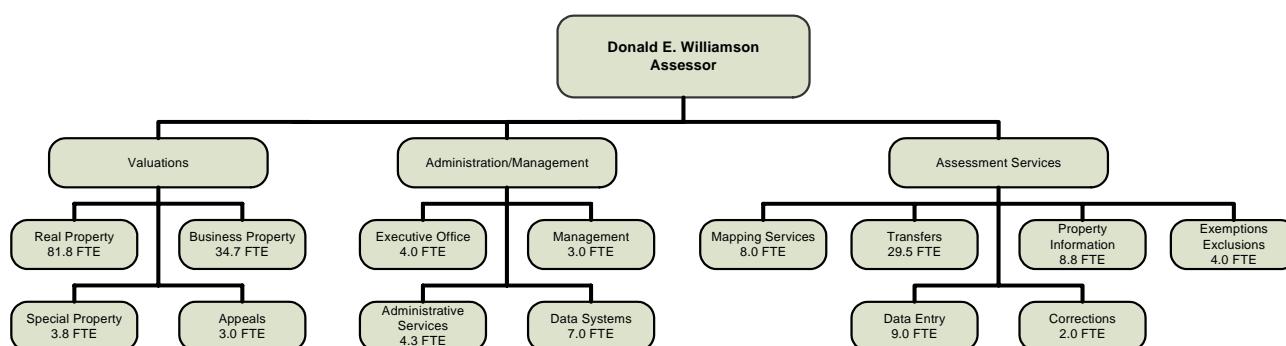
#### I. MISSION STATEMENT

The mission of the Office of the Assessor is to perform the state mandated function to:

- a. Locate, describe, and identify ownership of all property within the county
- b. Establish a taxable value for all property subject to taxation
- c. List all taxable value on the assessment roll
- d. Apply all legal exemptions

Assessor business is performed for the public benefit in a manner that is fair, informative and with uniform treatment. It is necessary as a means of revenue generation in order to fund essential public services and efficiently operate county and state government.

#### II. ORGANIZATIONAL CHART



#### III. SUMMARY OF BUDGET UNITS

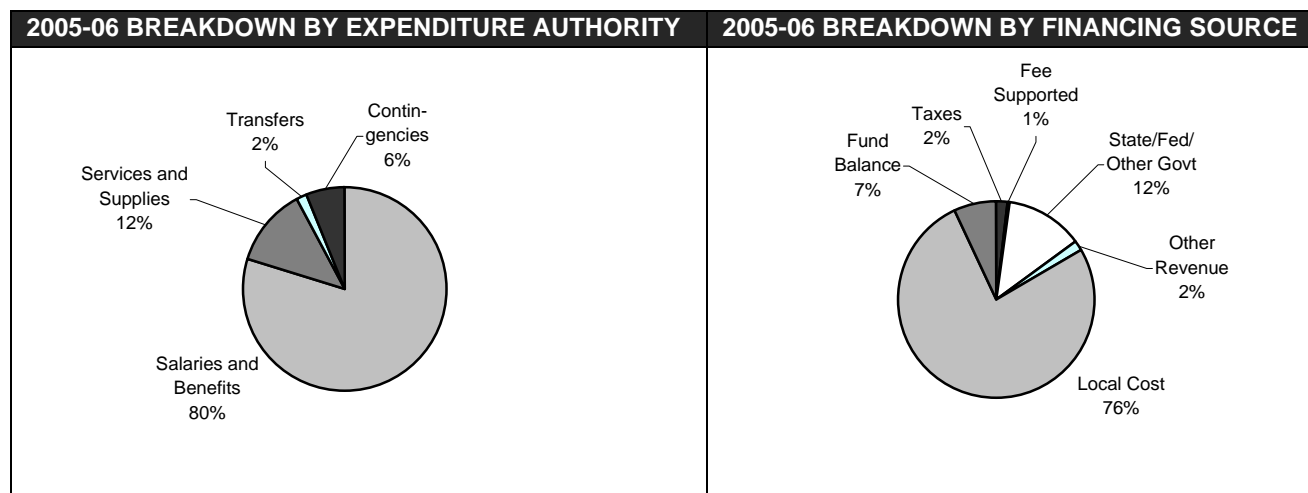
	2005-06				
	Appropriation	Revenue	Local Cost	Fund Balance	Staffing
Assessor	13,665,978	647,500	13,018,478		175.6
State/County Property Admin Program	3,342,314	2,171,438		1,170,876	28.3
<b>TOTAL</b>	<b>17,008,292</b>	<b>2,818,938</b>	<b>13,018,478</b>	<b>1,170,876</b>	<b>203.9</b>

#### IV. DESCRIPTION OF MAJOR SERVICES

Under California law, the Assessor establishes a value for all property including residential, commercial, business and personal. The Assessor maintains current records on approximately 675,000 parcels of real property, 43,000 business property accounts and 33,000 other assessments including boats, aircraft, and manufactured home accessories. The Assessor also administers 17 different types of property tax exemptions including homeowners, veteran, disabled veteran, church, religious, and welfare exemptions.



## V. 2005-06 BUDGET



## VI. GOALS & 2006-07 OBJECTIVES AT CURRENT FUNDING LEVELS

GOALS	2006-07 OBJECTIVES
1. Increase public service by making property information more accessible and easier to understand.	<p>A. Improve Internet website: restructure the website to assure all information and forms are available in an easy to read and easily accessible format.</p> <p>B. Improve the phone system to direct callers to the Assessor's Internet site for possible answers to questions if a live attendant is unavailable.</p> <p>C. Reevaluate the Property Information Management System (PIMS) Internet website: present all legally available information in an easy to access format.</p> <p>D. Provide more information and services in Spanish: informational brochures, website, phone directory.</p>
2. Enhance operational efficiency and productivity by utilizing new technology, policies and procedures.	<p>A. Maximize the efficient use of the Assessment Evaluation Services (AES) system.</p> <p>B. Train employees on the new workflow system.</p>
3. Assure quality control standardization.	<p>A. Perform periodic and rotating accuracy checks on the processing of changes of ownership.</p> <p>B. Perform non-mandatory audits to assure businesses are reporting accurately and as required by law.</p>

These goals were selected because these areas have been identified as ones needing improvement. The property tax assessment process can be confusing and the Assessor endeavors to provide public assistance and information to lessen this confusion.



In an effort to make information available from the Assessor's Office more easily accessible and easier to understand, improvements will be made to the department's internet website, the public information phone system, and the Property Information Management System (PIMS). Enhancements to the website will include making all forms electronically available. Enhancements to the phone system will include directing callers placed on hold, due to heavy call volume, to the website for answers and information. PIMS will be enhanced to assure that all legally available information is available in an easy to access format. In addition, more of this information will be made available in a Spanish format to better serve the public. Over the last few years the number of Spanish speaking taxpayers in San Bernardino County has increased dramatically. In order to continue to deliver a high level of customer service to all taxpayers, the need exists to increase the services available in a Spanish language format such as forms and informational brochures, a phone directory and a Spanish language version of the website.

The AES valuation tool automates the manual comparable sale selection and adjustment process for residential appraisals. As staff adapts to the program, productivity will increase. Likewise, the workflow digital image system will streamline the former paper record processing of deeds, exclusions, and business property statements. Other areas of business have been identified to incorporate into the workflow system in the future. The result of these improvements is more efficient use of existing staff levels, which will help the department keep pace with workload increases due to property development.

To assure that all divisions and the nine district offices of the Assessor are performing their area of business consistently and according to the written procedure, accuracy checks will be performed on samples of work, policies and procedures will be reviewed for consistent application across divisions, and *non-mandatory* audits will be performed.

Additionally, a countywide GIS project is near completion. When functional access to useful data layers is available, we will develop applications to leverage this resource to improve service to the public and accelerate the valuation research process. For example, allowing taxpayers to search for a parcel from a map. The Assessor's Office will also seek to identify new workflow enhancements and opportunities for reducing paper-based systems.

Accomplishment of these goals will mitigate rising costs of operation and improve customer service.

## VII. PERFORMANCE MEASURES AT CURRENT FUNDING LEVELS

OBJT.	MEASUREMENT	2006-07 (Projected)
1A&C.	Use of a satisfaction survey on the website consisting of a yes/no format to determine if the visitor found what information they were looking for. Baseline to be established prior to the start of 2006-07.	70% yes responses
1B.	Wait times to direct callers, compare to prior year's results.	5% Reduction
1D.	Number of new informational instruction sheets available in Spanish.	10% Increase
2A.	Residential appraisers' production rate.	10% Increase
2B.	Title Transfer Technicians' production rate.	10% Increase
3A.	Percentage of reviewed change of ownership events that have been processed accurately.	95% (475)
3B.	Number of non-mandatory audits performed annually.	10% Increase (20 audits)



# **VIII. GOALS & OBJECTIVES IF ADDITIONAL FUNDING (POLICY ITEMS/NEW FEES) IS APPROVED**

GOALS	OBJECTIVES
Assure acceptable level of public service is provided to San Bernardino County taxpayers.	<p>Increase staff by 2.0 Office Assistant III positions in the Property Information division to handle extremely heavy call volume and taxpayer walk-in rate. These positions will help assure an acceptable level of customer service is provided to San Bernardino County Tax payers.</p> <p>Additional Funding Requested: \$78,000</p>
Institute a quality control program in the Transfers unit to assure that change of ownership (COS) transfer events are processed accurately.	<p>Increase staff by 1.0 Title Transfer Technician II position. The Assessor wishes to institute a quality control program in the Transfers unit to assure that change in ownership (COS) transfer events are processed accurately. It is important that an acceptable level of accuracy is maintained for State Board of Equalization surveys. Erroneously processed COS can also result in missed reappraisable transfers and additional work for the Transfers, Mapping, Appraisal, Exemptions and Exclusions units. The additional Title Transfer Technician II position is needed as appointees to this classification must have a high degree of expertise in COS law. The position will also be charged with responsibilities including identifying training needs and assisting supervision in preparing and delivering training information.</p> <p>Additional Funding Requested: \$56,800</p>

If there are questions about this business plan, please contact Mark Mosher, Administrative Manager, at (909) 387-6584.

